

**BEFORE THE PUBLIC UTILITIES COMMISSION  
OF THE STATE OF CALIFORNIA**



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Order Instituting Rulemaking on the  
Commission's Own Motion to Conduct a  
Comprehensive Examination of Investor  
Owned Electric Utilities' Residential Rate  
Structures, the Transition to Time Varying and  
Dynamic Rates, and Other Statutory  
Obligations

U 39 E

R.12-06-013  
(Filed June 21, 2012)

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**STATEMENT OF PACIFIC GAS AND ELECTRIC COMPANY (U 39 E) ON STATUS  
OF CARE RESTRUCTURING PRE-WORKING GROUP'S PROGRESS PURSUANT  
TO OCTOBER 24, 2016, ADMINISTRATIVE LAW JUDGE'S RULING**

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Dated: October 27, 2016

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OF CARE RESTRUCTURING PRE-WORKING GROUP'S PROGRESS PURSUANT  
TO OCTOBER 24, 2016, ADMINISTRATIVE LAW JUDGE'S RULING**

Pursuant to the October 24, 2016, email ruling of the Administrative Law Judge (ALJ) on the progress of the California Alternative Rates for Energy (CARE) Working Group (WG) in this proceeding, Pacific Gas and Electric Company (PG&E), on behalf of the pre-working group participating parties, including The Utility Reform Network (TURN), hereby files this Statement on Status of CARE Restructuring Pre-Working Group Progress as required by the ALJ Ruling.<sup>1/</sup> The pre-working group parties include Center for Accessible Technology, Consumer Federation of California, Office of Ratepayer Advocates, PG&E, San Diego Gas & Electric Company, Southern California Edison Company, The Utility Reform Network and Utility Consumers Action Network, with facilitation by the Energy Division. Other parties interested in participating in this WG are welcome, with notice of a joint WG meeting to be sent to the service list for R.12-06-013 going forward.

Pursuant to the April 1, 2016 email ruling of the ALJ, PG&E filed a joint statement of the

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<sup>1/</sup> This Statement is filed and served on behalf of the parties participating in the CARE Restructuring Pre-Working Group, and the participating parties have authorized PG&E to file and serve this Statement on their behalf.

parties on June 6, 2016 on the status of the CARE Restructuring Pre-Working Group Discussions. Since that filing, Energy Division staff has coordinated and convened calls with various parties that have resulted in the following activities:

- July 26 – A consolidated spreadsheet (Attachment 1) on the ranking of the external data points by the non-IOUs was distributed to the WG
- August 10 – Neha Bazaj led a call with the IOUs that resulted in two action items to be completed by COB August 24 with the information distributed to the WG, and provided an updated consolidated spreadsheet with the CPUC’s data ranking (Attachment 2)
  - 1. Each IOU to review the list of Externally-Generated Data and note, for each item:
    - Whether or not they have access to the data
    - The source of the data (e.g. Experian, Axiom, Athens, etc.)
    - The time period for which the data is available (e.g. 2014, 2015, 2013-2015, etc.)
    - The geographic level at which the data is available (e.g. zip + 4, 5 digit zip, census tract, etc.)
  - 2. Each IOU to provide the dataset that was previously provided to the CPUC’s Policy and Planning Division for the creation of the *Geospatial Analysis of California’s Utility Services* Report
  - This data set includes some of the information (by zip code) that we are interested in:
    - Monthly electric and gas bill amounts
    - Usage
    - data from the California Alternate Rates for Energy (CARE),
    - the Family Electric Rate Assistance (FERA) and the
    - Energy Savings Assistance (ESA) programs – PG&E, SCE, SDG&E and SoCalGas
- August 17 – SDG&E sent its comments with attachments
- August 24 – PG&E sent its comments on item #1 above, and sent the data sets in #2 to TURN and CFC (sent data set on August 25 upon receipt of signed Non-Disclosure Agreement (NDA)); the remaining parties have not yet returned a signed NDA
- August 25 – SCE sent its comments on #1 above, and sent the data sets in #2 to Energy Division on September 16

- September 20 – PG&E call with Energy Division to discuss the load research sample
- October 24 – SDG&E sent a reply to Energy Division regarding follow up questions regarding access to Experian and Axiom data

**Next Step:** Energy Division to convene a call with the IOUs to discuss a revised data set and to set a common understanding of how to pull the sample to maximize the comparability of the data sets.

Respectfully Submitted,

GAIL L. SLOCUM  
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By: /s/ Gail L. Slocum  
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On behalf of Pacific Gas and Electric  
Company  
Attorneys for  
PACIFIC GAS AND ELECTRIC  
COMPANY

Dated: October 27, 2016

## **ATTACHMENT 1**

IOU-Generated Data (by zip code+4)						
		SDG&E	PG&E	SCE		UCAN
#	Data Point	2013 - 2015	2013 - 2015	2013 - 2015		
1	Bills (\$), month, seasonal, annual	Y	Y	Y		1
2	Usage (kWh), month, seasonal, annual	Y	Y	Y		1
3	Tier usage, monthly	Y	Y	Y		1
4	Arrearages (30/60/90/more)	Y	Y	Y		2
5	Disconnections/Reconnections	Y	Y	Y		1
6	Payment arrangements	Y	Y	Y		2
7	Balanced payment plans	Y	Y	Y		3
8	Payment type	Y	Y	Y		3
9	Household type (multi, single, mobile)	N	Mostly	N		3
10	Ownership status	N	N	N		2
11	48 hour disconnection/service termination notice	Y	Y	Y		1
12	Tariff/All electric/Master meter	N	Y	Y		3
13	Categorically enrolled	Y	Y	Y		2
14	Customer contacts (by channel)	Y	Y	Y		3
15	CARE enrolled	Y	Y	Y		1
16	ESA treated	Y	Y	Y		2
17	ESA eligible	Y	Y	Y		1
18	SASH/MASH participation	Y	Y	Y		2
19	Housing vintage	Y	N	N		4
20	NEM vs. non-NEM	Y	Y	Y		4
21	Medical baseline enrolled	Y	Y	Y		2
22	Language preference	N	N	N		3
23	FERA enrolled	Y	Y	Y		2

#### Notes

"No" in the years column implies only current data is available

PG&E has 75% of the data available for household type. SCE and SDG&E have complete data sets.

Mostly - PG&E has a data field for this but it is not billing quality.

PG&E only has self-reported data on housing vintage, language spoken in home.

TURN Note: We'd like data by zip +4 codes (with the understanding that privacy protections may indicate the need to roll several together)

Externally-Generated Data							
#	Data Point	UCAN	ORA	CforAT	CFC	TURN	Average
1	Income	1	1	1	1	1	1.0
2	Household size	2	2	1	2	1	1.6
3	House size	3	2	1	3	1	2.0
4	Seasonal workers vs. fully employed	1	2	3	2	1	1.8
5	Single parent vs. dual parent households	3	2	3	3	1	2.4
6	# of income earners in household	1	2	1	1	1	1.2
7	Area median income	3	3	1	1	1	1.8
8	Internet access	4	4	2	3	1	2.8
9	Other utility (water, gas) bill assistance	1	2	2	1	1	1.4
10	Housing assistance	1	3	2	1	1	1.6
11	SNAP	2	2	2	1	1	1.6
12	CARE eligibility	1	1	1	1	1	1.0
13	LIHEAP treated	1	1	1	1	1	1.0
14	Credit profile	3	4	4	1	1	2.6
15	Credit score	4	4	4	1	1	2.8
16	Disability in household	3	2	1	1	1	1.6
17	Customer persona	2	4	2	4	1	2.6
18	Senior in household	3	2	1	1	1	1.6
19	Language spoken in home	4	2	2	4	1	2.6

#### Notes

External data could be taken from the census bureau, credit rating agency, Athens. It is not generated by the IOU.

TURN Note: Only needs most recent year of this data. If the IOUs can obtain any of this data from external sources by zip+4, then TURN would give those data points a top priority. If we seek to obtain it directly from census data (for those data points provided by census data), we would not be able to get it by zip+4 but by census tracts, which would require us to develop crosswalks. Clarity about which data points the IOUs would get from sources other than census or ACS AND which data points the IOUs could get by zip+4, would help us to refine our rankings. We are ranking all points as "1" as a placeholder.



## **ATTACHMENT 2**

IOU-Generated Data (by zip code+4)											
		SDG&E	PG&E	SCE		UCAN	ORA	CforAT	CFC	TURN	Average
#	Data Point	2013 - 2015	2013 - 2015	2013 - 2015							
1	Bills (\$), month, seasonal, annual	Y	Y	Y		1	1	1	1	1	1.0
2	Usage (kWh), month, seasonal, annual	Y	Y	Y		1	1	1	1	1	1.0
3	Tier usage, monthly	Y	Y	Y		1	1	1	1	1	1.0
4	Arrearages (30/60/90/more)	Y	Y	Y		2	1	1	1	1	1.2
5	Disconnections/Reconnections	Y	Y	Y		1	1	1	1	1	1.0
6	Payment arrangements	Y	Y	Y		2	2	1	1	1	1.4
7	Balanced payment plans	Y	Y	Y		3	2	1	3	2	2.2
8	Payment type	Y	Y	Y		3	4	2	3	2	2.8
9	Household type (multi, single, mobile)	N	Mostly	N		3	3	2	3	4	3.0
10	Ownership status	N	N	N		2	3	2	2	4	2.6
11	48 hour disconnection/service termination notice	Y	Y	Y		1	2	1	1	1	1.2
12	Tariff/All electric/Master meter	N	Y	Y		3	1	1	3	3	2.2
13	Categorically enrolled	Y	Y	Y		2	2	3	2	2	2.2
14	Customer contacts (by channel)	Y	Y	Y		3	2	1	3	3	2.4
15	CARE enrolled	Y	Y	Y		1	1	1	1	1	1.0
16	ESA treated	Y	Y	Y		2	2	2	1	1	1.6
17	ESA eligible	Y	Y	Y		1	2	2	1	1	1.4
18	SASH/MASH participation	Y	Y	Y		2	2	2	2	2	2.0
19	Housing vintage	Y	N	N		4	4	1	4	4	3.4
20	NEM vs. non-NEM	Y	Y	Y		4	2	2	3	2	2.6
21	Medical baseline enrolled	Y	Y	Y		2	2	1	1	1	1.4
22	Language preference	N	N	N		3	2	2	4	4	3.0
23	FERA enrolled	Y	Y	Y		2	3	1	1	1	1.6

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TURN Note: We'd like data by zip +4 codes (with the understanding that privacy protections may indicate the need to roll several together)

TURN Note: For those data points labeled 1--highest priority--we would like to have CARE-related data going back to 2008. This will help us to understand the relationship between economic conditions during crisis and recovery and payment histories, arrearages, and disconnections; understand the correlations between CARE/FERA/Medical Baseline participation and payment histories, arrearages, and disconnections; and understand patterns between monthly bills and payment histories, arrearages, and disconnections.

TURN Note: Disconnections/Reconnections - Monthly, and length of disconnections 0-24 hours, 24-48 hours, 48-72 hours and 72 or more and for all customer categories (CARE, FERA, Medical baseline and other) the IOUs regularly report

TURN Note: 48 hour disconnection/service termination notice, medical baseline enrolled, FERA enrolled - Monthly and by all customer categories

Externally-Generated Data										
#	Data Point	UCAN	ORA	CforAT	CFC	TURN	Average		CPUC	Average w/ CPUC scores
1	Income	1	1	1	1	1	1.0		1	1.0
2	Household size	2	2	1	2	1	1.6		1	1.5
3	House size	3	2	1	3	1	2.0		3	2.2
4	Seasonal workers vs. fully employed	1	2	3	2	1	1.8		4	2.2
5	Single parent vs. dual parent households	3	2	3	3	1	2.4		4	2.7
6	# of income earners in household	1	2	1	1	1	1.2		4	1.7
7	Area median income	3	3	1	1	1	1.8		4	2.2
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